

The Australian TCF Industry - A Profile

The Council of Textile and Fashion Industries of Australia (TFIA) has developed this information sheet to provide a comprehensive overview of the TCF industry in Australia. It is based on the most recently published data from the Australian Bureau of Statistics and has been updated where possible by TFIA Business Services.

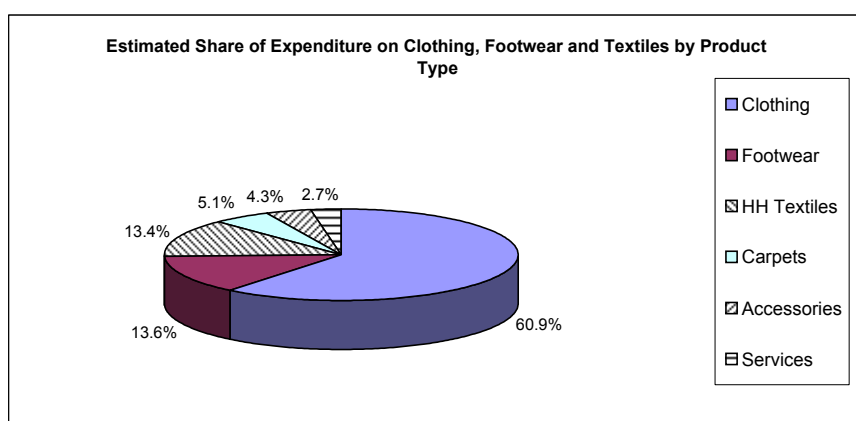
This sheet will be progressively updated as new data becomes available. For further information on the TFIA and TFIA Business Services please visit www.tfia.com.au <<http://www.tfia.com.au>> or contact at the numbers or email below.



SUMMARY OF EXPENDITURE ON CLOTHING, FOOTWEAR, CARPETS AND HOUSEHOLD TEXTILES 1998/99

Estimated Annual Expenditure (\$Millions) By Category , By State

	Clothing	Accessories	Footwear	Services	Carpets	Household Textiles	Total	Percentage Distribution
New South Wales	3214	222	668	159	254	689	5206	36.0%
Victoria	2451	145	517	103	163	434	3812	26.3%
Queensland	1296	103	351	47	87	402	2285	15.8%
South Australia	640	52	144	29	94	141	1100	7.6%
Western Australia	783	70	170	39	89	160	1310	9.1%
Tasmania	214	14	72	7	27	45	380	2.6%
Northern Territory	33	3	6	1	2	11	57	0.4%
ACT	171	14	36	10	25	64	320	2.2%
 Australia	 8830	 622	 1971	 393	 741	 1945	 14501	 100.0%
 Percentage Distribution	 60.9%	 4.3%	 13.6%	 2.7%	 5.1%	 13.4%	 100.0%	



Estimated Annual Expenditure

	Millions	Percentage Distribution
Clothing	8830	60.9%
Footwear	1971	13.6%
HH Textiles	1945	13.4%
Carpets	741	5.1%
Accessories	622	4.3%
Services	393	2.7%
Total	14501	100.0%

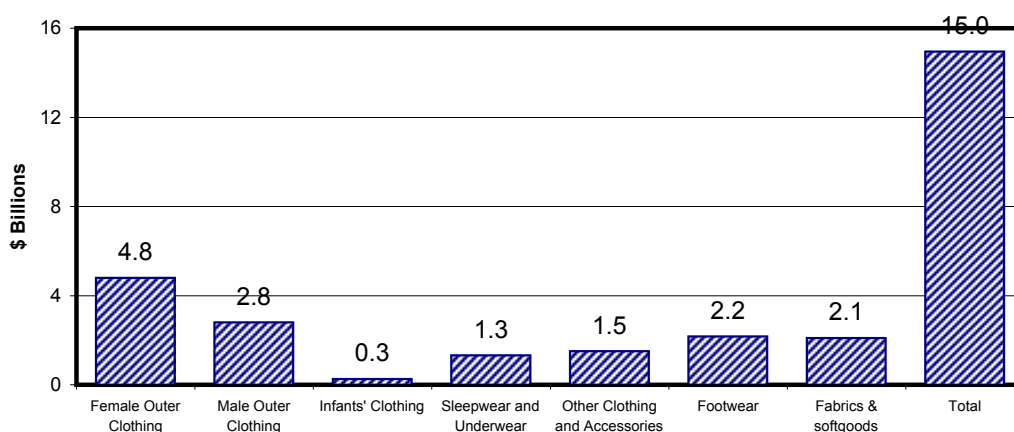
* From the most recent Household Expenditure Survey by the ABS - 1998/99

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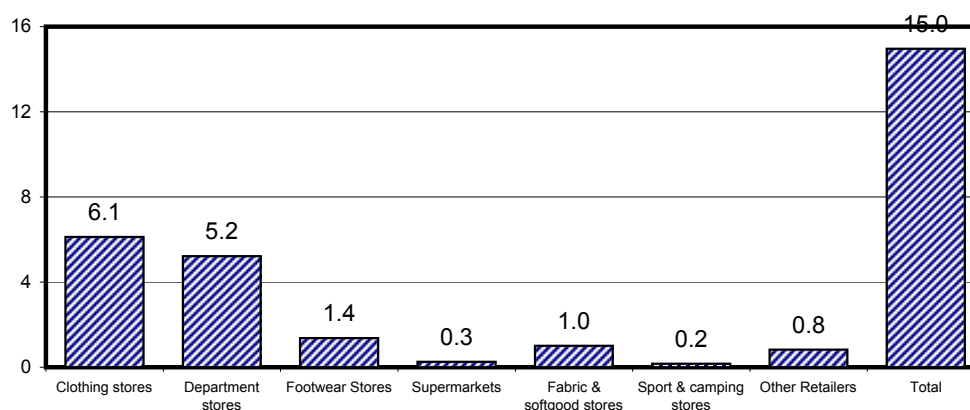
RETAIL SALES OF TCF COMMODITIES - 1998/99

Type of Product	\$Billion	Type of Outlet	\$Billion
Female Outer Clothing	4.8	Clothing stores	6.1
Male Outer Clothing	2.8	Department stores	5.2
Infants' Clothing	0.3	Footwear Stores	1.4
Sleepwear and Underwear	1.3	Supermarkets	0.3
Other Clothing and Accessories	1.5	Fabric & softgood stores	1.0
Footwear	2.2	Sport & camping stores	0.2
Fabrics & softgoods	2.1	Other Retailers	0.8
Total	15.0	Total	15.0

**Retail Sales of TCF Commodities - 1998/99
by Type of Product**



**Retail Sales of TCF Commodities - 1998/99
by Type of Retail Outlet**

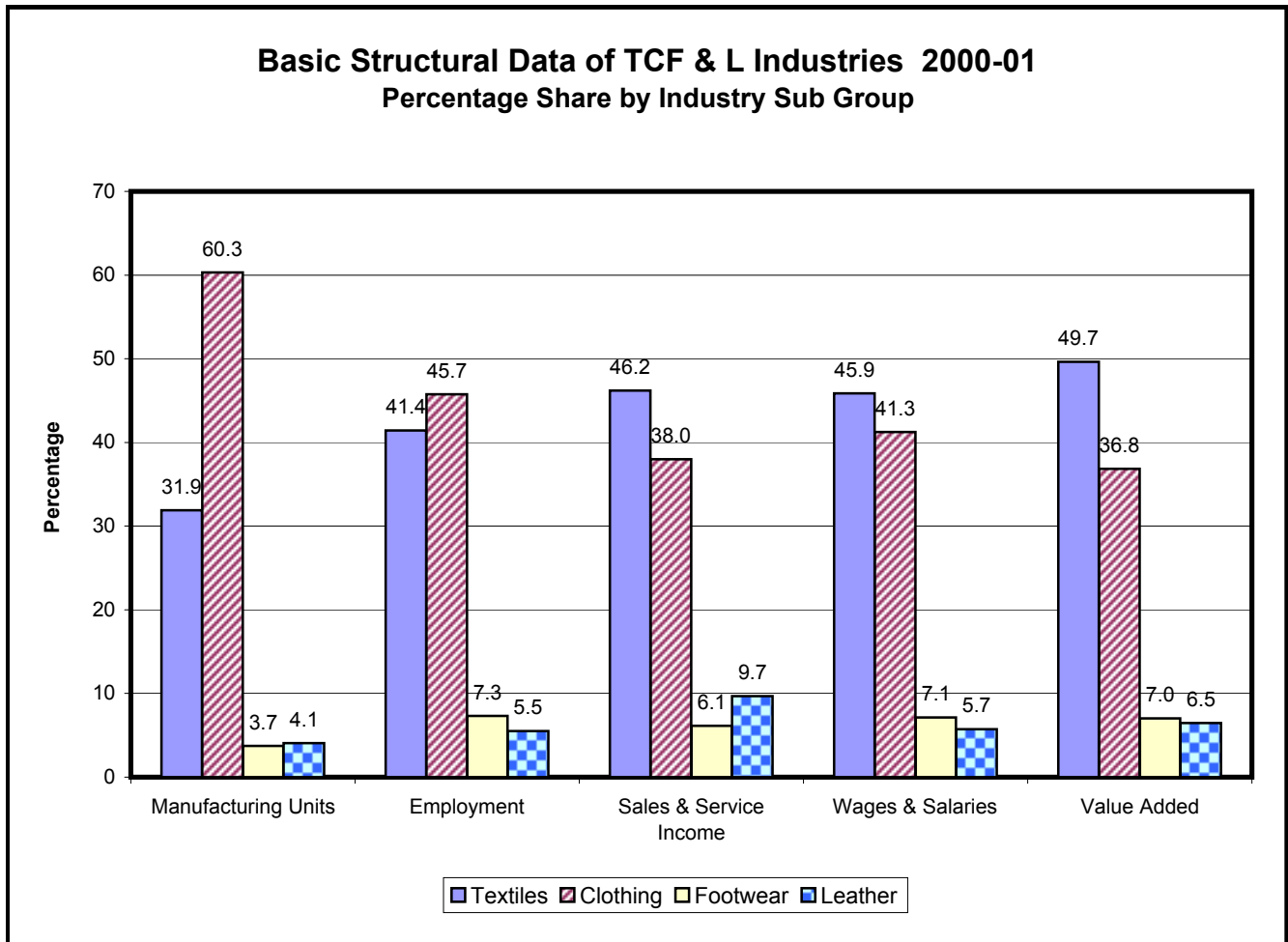


* From the most recent Household Expenditure Survey by the ABS - 1998/99

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Basic Structural Data 2000-01

	* Management Units	No.	* Employment 000s	Sales & service income \$m	Wages and Salaries \$m	Value Added \$m
Textiles		1564	23.9	4,210	804.6	1,282.7
Clothing		2958	26.4	3,461	723.6	951.4
Footwear		183	4.2	558	125.1	181.7
Leather		200	3.2	882	100.5	167.5
TCF & L		4905	57.8	9,111	1,753.9	2,583.3



* Management and Employment data has not been updated by the ABS since 2000-01.

TCF INDUSTRY STRUCTURE 2000/01

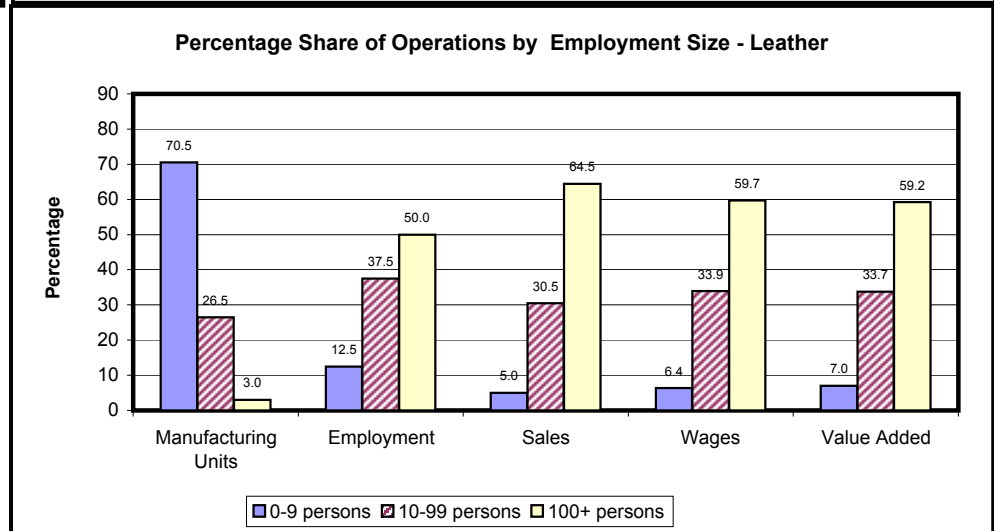
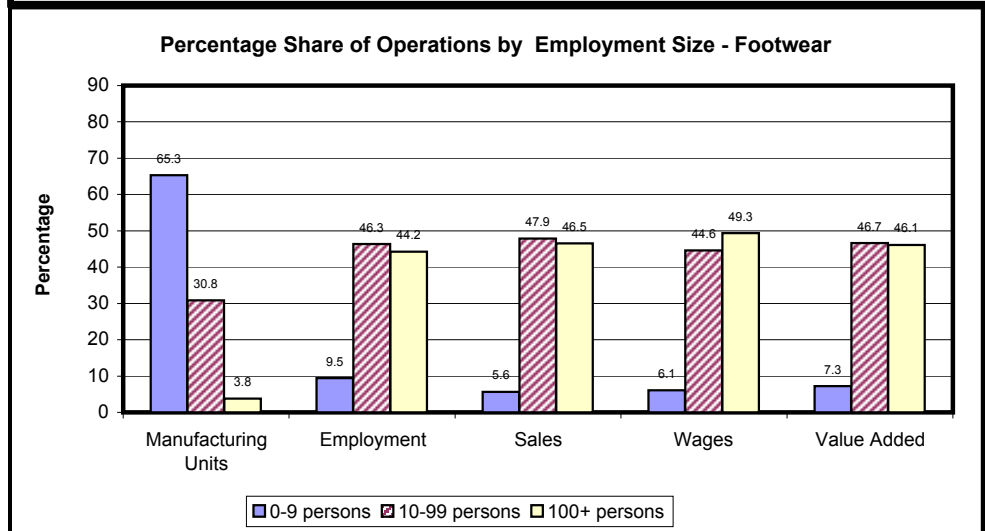
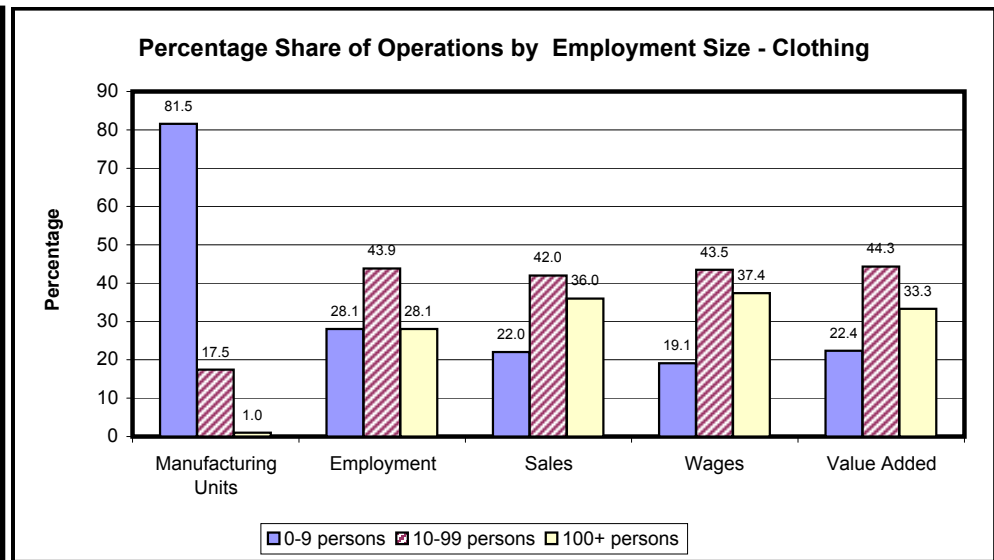
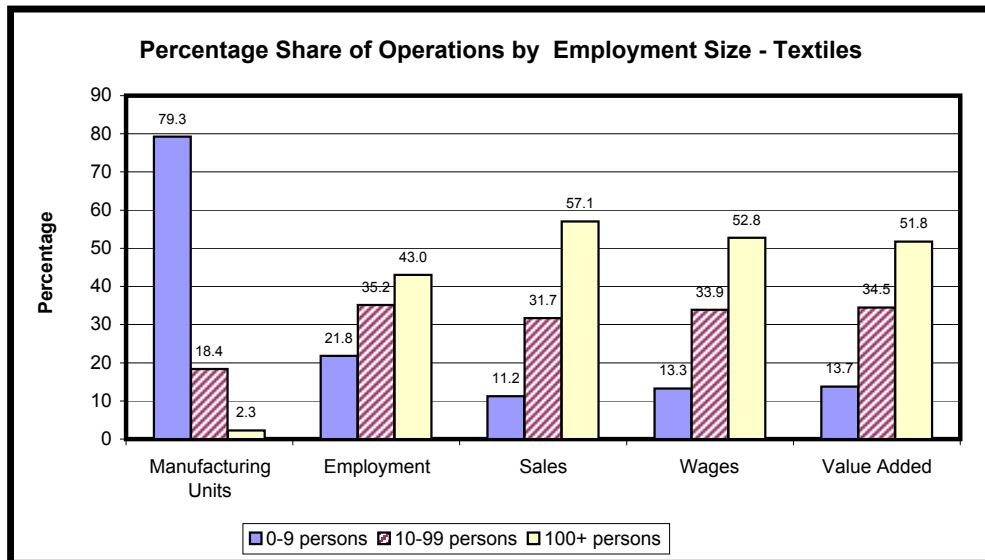
	Employment at end of June 000's	Wages and Salaries \$Million	Sales & Service Income \$Million	Industry Value Added \$Million	Sales per person Employed \$000's	Value Added per person Employed \$000's
TEXTILE, CLOTHING, FOOTWEAR AND LEATHER MANUFACTURING						
New South Wales	15.2	476.1	2,525.6	681.1	166.1	44.8
Victoria	27.3	873.4	4,467.1	1,301.6	163.9	47.8
Queensland	5.7	142.8	686.6	211.1	120.4	37.0
South Australia	4.2	115.9	847.5	176.7	199.6	41.6
Western Australia	3.8	101.3	411.1	149.7	106.9	38.9
Tasmania	1.4	40.9	158.9	58.3	117.3	43.1
Northern Territory and A.C.T.))	0.2	3.6	14.0	4.8	24.0
Total Australia	57.8	1,753.9	9,110.8	2,583.3	157.6	44.7
DISTRIBUTION BY STATE	%	%	%	%		
New South Wales	26.3	27.1	27.7	26.4		
Victoria	47.2	49.8	49.0	50.4		
Queensland	9.9	8.1	7.5	8.2		
South Australia	7.3	6.6	9.3	6.8		
Western Australia	6.6	5.8	4.5	5.8		
Tasmania	2.4	2.3	1.7	2.3		
Northern Territory and A.C.T.	0.3	0.2	0.2	0.2		
Total Australia	100.0	100.0	100.0	100.0		
TOTAL MANUFACTURING	000's	\$Million	\$Million	\$Million	\$000's	\$000's
New South Wales	296	12,506	78,659	23,067	266.1	78.0
Victoria	302	12,949	80,580	23,251	266.6	76.9
Queensland	153	5,533	40,292	10,323	263.9	67.6
South Australia	93	3,577	23,623	6,192	254.4	66.7
Western Australia	75	3,074	21,702	6,780	291.5	91.1
Tasmania	21	776	5,044	1,757	244.4	85.1
Northern Territory and A.C.T.))	7	330	1,859	251.2	77.7
Total Australia	946	38,746	251,759	71,946	266.2	76.1
TCF & L AS A PERCENTAGE OF TOTAL MANUFACTURING	%	%	%	%		
New South Wales	5.1	3.8	3.2	3.0		
Victoria	9.0	6.7	5.5	5.6		
Queensland	3.7	2.6	1.7	2.0		
South Australia	4.5	3.2	3.6	2.9		
Western Australia	5.1	3.3	1.9	2.2		
Tasmania	6.8	5.3	3.2	3.3		
Northern Territory A.C.T.	2.7	1.1	0.8	0.8		
Total Australia	6.1	4.5	3.6	3.6		

Source: ABS

* Some of the data has not been updated by the ABS since 2000-01 but is still thought to give a fair representation of the current environment.

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TEXTILES, CLOTHING, FOOTWEAR AND LEATHER MANUFACTURING 2000/01 Summary of Operations by Employment Size of the Manufacturing Units



* Much of the data has not been updated by the ABS since 2000-01 but it is still thought to give a fair representation of the current environment.

The Australian TCF Industry - A Profile

Selected TCFL Data - Australia

Industry Sector	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	Percentage Change 1990-91 to 2002-03
DOMESTIC DEMAND (\$000s) *														
Textiles and Textile Products excluding wool scouring	5,286,571	5,301,298	5,122,973	5,250,135	5,364,406	5,187,277	4,984,181	5,230,230	5,318,581	5,419,265	5,455,879	6,117,283	6,420,484	21.4%
Clothing and Knitting Mills	5,352,039	5,530,583	5,497,496	5,756,550	5,819,603	6,012,767	6,056,657	6,507,422	6,773,118	6,419,989	6,267,356	7,569,171	7,792,182	45.6%
Footwear	1,050,083	1,014,266	1,092,586	1,092,515	1,112,167	1,086,085	1,175,034	1,261,348	1,310,484	1,294,412	1,421,800	1,428,424	1,544,535	47.1%
Leather product mfg	280,631	304,159	339,348	352,697	401,954	453,085	421,410	435,142	440,878	468,456	492,736	634,713	669,049	138.4%
Total TCF & L manufacturing	11,969,324	12,150,306	12,052,403	12,451,897	12,698,130	12,739,214	12,637,282	13,434,142	13,843,061	13,602,121	13,637,771	15,749,592	16,426,250	37.2%
Wool scouring and Leather tanning	-4,369	-235,819	-192,180	-204,338	-392,291	-336,631	-395,466	-487,363	-206,990	-123,605	-74,784	-18,836	-316,397	7141.9%
Grand Total TCF &L	11,964,955	11,914,487	11,860,223	12,247,559	12,305,839	12,402,583	12,241,816	12,946,779	13,636,071	13,478,516	13,562,988	15,730,756	16,109,853	34.6%
# Turnover + Imports -Exports														
IMPORT SHARE OF DOMESTIC DEMAND %														
Textiles and Textile Products excluding wool scouring	34.4	38.1	41.7	42.5	45.3	44.6	44.3	46.3	46.8	46.3	46.3	40.43	41.24	
Clothing and Knitting Mills	18.5	20.8	24.9	26.6	29.0	30.3	31.6	36.4	37.4	44.9	51.8	43.04	44.00	
Footwear	36.4	40.5	46.7	46.6	50.8	52.5	52.6	55.7	59.0	64.9	65.1	68.16	65.40	
Leather product mfg	80.0	82.1	81.9	83.4	85.8	81.2	82.2	84.6	86.1	89.7	97.2	75.63	75.21	
Total TCF & L manufacturing	28.5	31.5	35.7	36.7	39.6	39.8	40.3	43.6	44.6	48.9	52.6	45.62	46.21	
Wool scouring and Leather tanning	-3,473.2	-66.7	-85.0	-90.6	-55.5	-61.9	-50.7	-36.6	-85.4	-158.9	-284.7	-1251.38	-68.34	
Grand Total TCF &L	29.8	33.4	37.6	38.8	42.6	42.6	43.2	46.6	46.6	50.8	54.5	47.17	48.45	
EXPORT SHARE OF TURNOVER %														
Textiles and Textile Products excluding wool scouring	5.7	6.6	9.5	10.8	12.8	15.5	17.0	17.1	16.8	16.4	15.4	11.98	10.69	
Clothing and Knitting Mills	3.2	3.8	5.1	6.3	7.8	7.9	9.0	9.6	9.1	10.6	12.7	8.73	8.26	
Footwear	3.4	4.6	6.4	9.3	9.3	11.1	10.2	8.7	10.6	11.9	11.1	11.63	8.84	
Leather product mfg	16.5	17.4	22.6	25.4	30.9	22.9	25.8	24.1	25.2	36.5	64.1	16.34	15.69	
Total TCF & L manufacturing	4.3	5.1	7.1	8.5	10.1	11.3	12.4	12.6	12.4	13.4	14.1	10.44	9.50	
Wool scouring and Leather tanning	118.4	143.9	135.5	137.1	149.9	145.4	150.9	153.8	135.7	126.9	118.1	117.16	141.16	
Grand Total TCF &L	14.2	18.0	20.9	22.5	27.6	27.7	28.9	30.3	25.9	28.1	32.2	24.77	24.91	

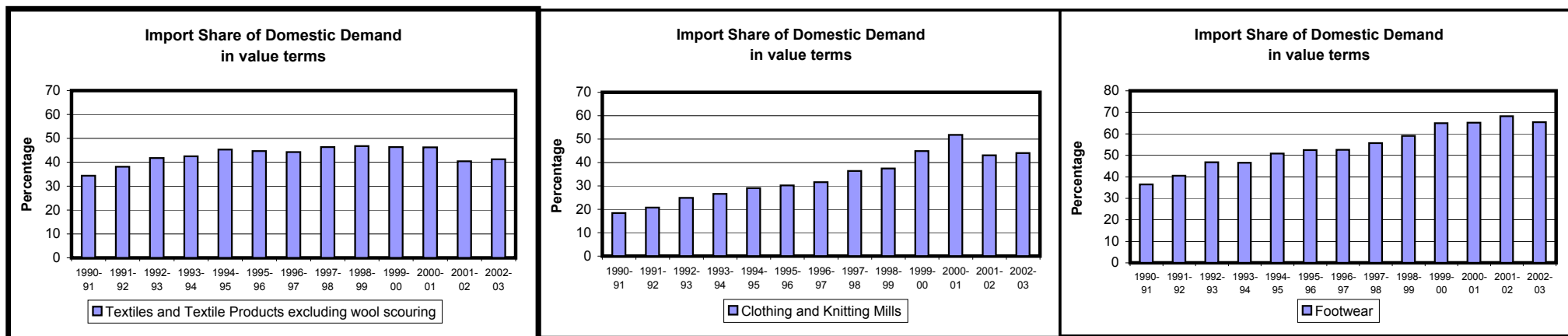
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Selected TCFL Data - Australia

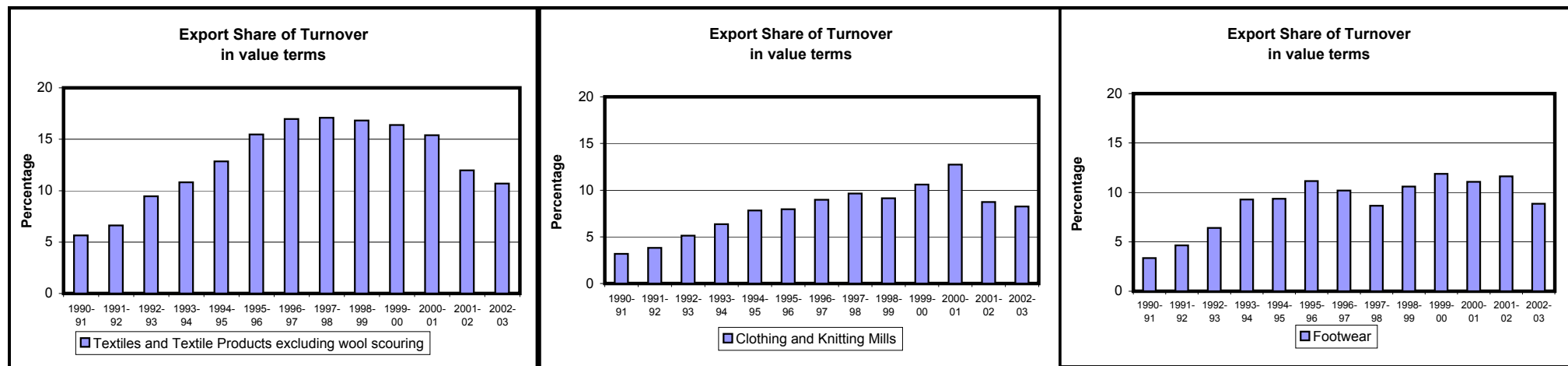
Industry Sector	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	Percentage Change 1990-91 to 2002-03
EXPORTS (\$000s)														
Textiles and Textile Products excluding wool scouring	207,989	232,172	311,885	366,358	432,882	525,529	567,928	578,414	572,109	569,851	533,147	496,178	451,705	117.2%
Clothing and Knitting Mills	143,654	174,414	223,068	286,294	350,576	362,106	408,009	441,989	425,483	419,552	440,599	412,186	392,723	173.4%
Footwear	23,163	29,335	39,817	59,713	56,389	64,682	63,220	52,991	63,599	61,163	61,684	59,837	51,829	123.8%
Leather product mfg	11,087	11,448	17,930	19,945	25,475	25,426	26,074	21,189	20,637	27,800	24,936	30,218	30,859	178.3%
Total TCF & L manufacturing	385,893	447,369	592,700	732,310	865,322	977,743	1,065,231	1,094,583	1,081,828	1,078,366	1,060,366	998,419	927,116	140.3%
 Wool scouring and Leather tanning	 1,002,289	 1,289,419	 1,358,151	 1,439,591	 1,832,579	 1,745,075	 1,766,822	 1,904,652	 1,458,237	 1,509,673	 1,876,211	 1,737,946	 1,826,831	 82.3%
Grand Total TCF & L	1,388,182	1,736,788	1,950,851	2,171,901	2,697,901	2,722,818	2,832,053	2,999,235	2,540,065	2,588,039	2,936,577	2,736,365	2,753,947	98.4%
 EXPORT SHARE OF TURNOVER %														
Textiles and Textile Products excluding wool scouring	5.7	6.6	9.5	10.8	12.8	15.5	17.0	17.1	16.8	16.4	15.4	12.0	10.7	
Clothing and Knitting Mills	3.2	3.8	5.1	6.3	7.8	7.9	9.0	9.6	9.1	10.6	12.7	8.7	8.3	
Footwear	3.4	4.6	6.4	9.3	9.3	11.1	10.2	8.7	10.6	11.9	11.1	11.6	8.8	
Leather product mfg	16.5	17.4	22.6	25.4	30.9	22.9	25.8	24.1	25.2	36.5	64.1	16.3	15.7	
Total TCF & L manufacturing	4.3	5.1	7.1	8.5	10.1	11.3	12.4	12.6	12.4	13.4	14.1	10.4	9.5	
 Wool scouring and Leather tanning	 118.4	 143.9	 135.5	 137.1	 149.9	 145.4	 150.9	 153.8	 135.7	 126.9	 118.1	 117.2	 141.2	
Grand Total TCF & L	14.2	18.0	20.9	22.5	27.6	27.7	28.9	30.3	25.9	28.1	32.2	24.8	24.9	

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IMPORT SHARE OF DOMESTIC DEMAND

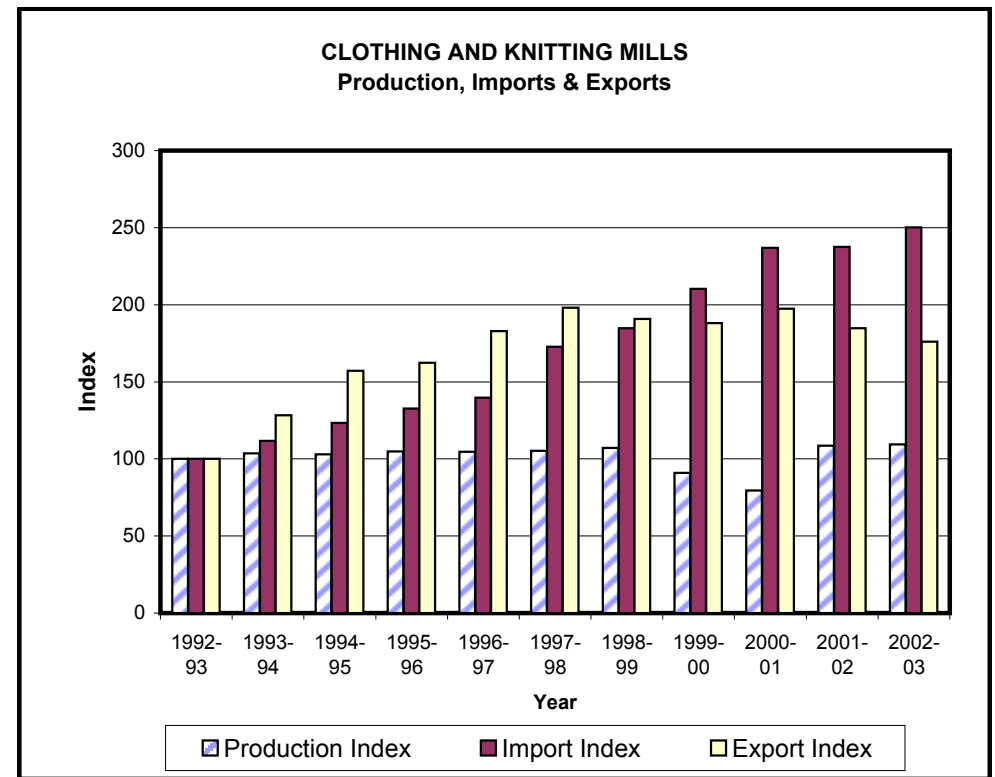
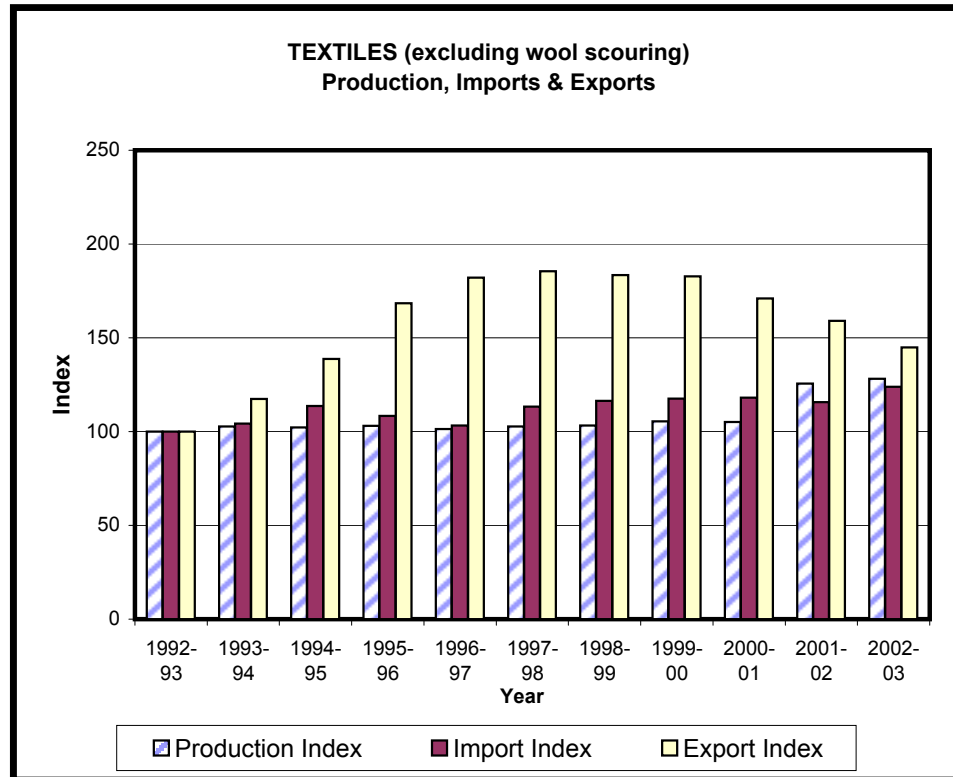


EXPORT SHARE OF TURNOVER

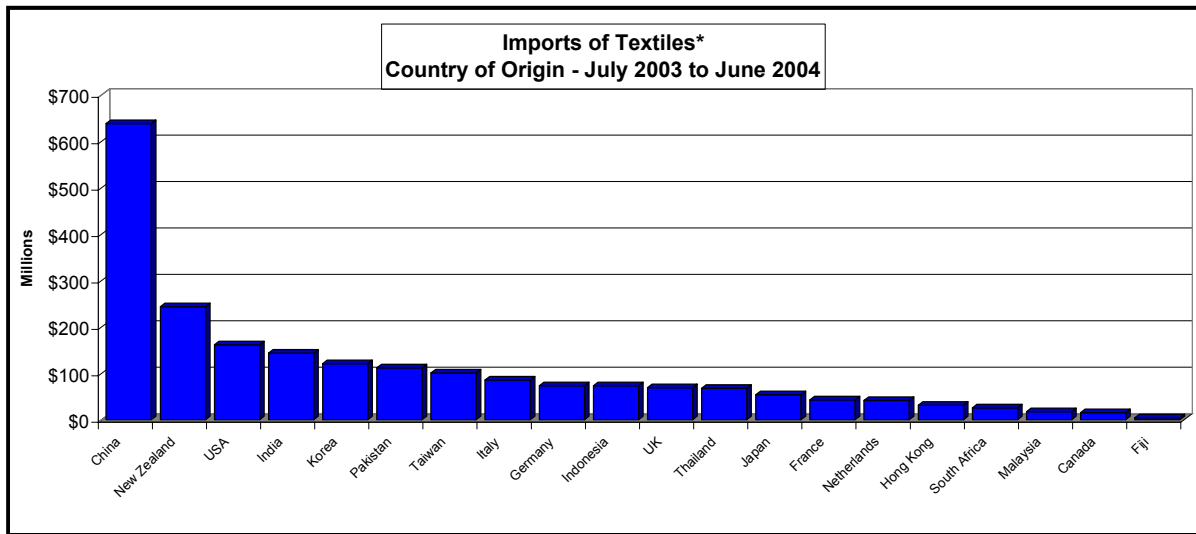


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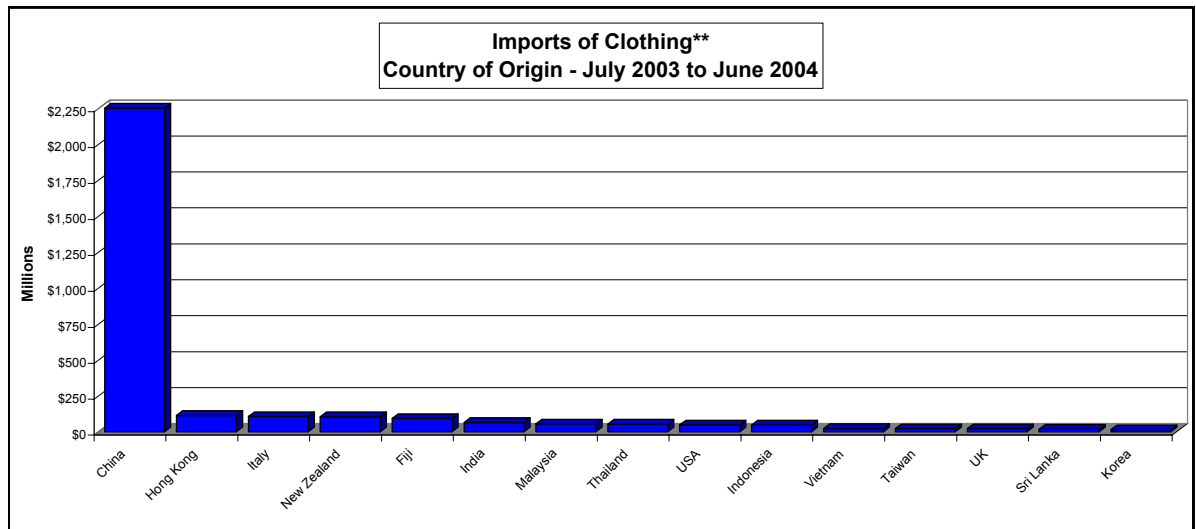
INDICES OF PRODUCTION, IMPORTS AND EXPORTS 1992/93 = 100



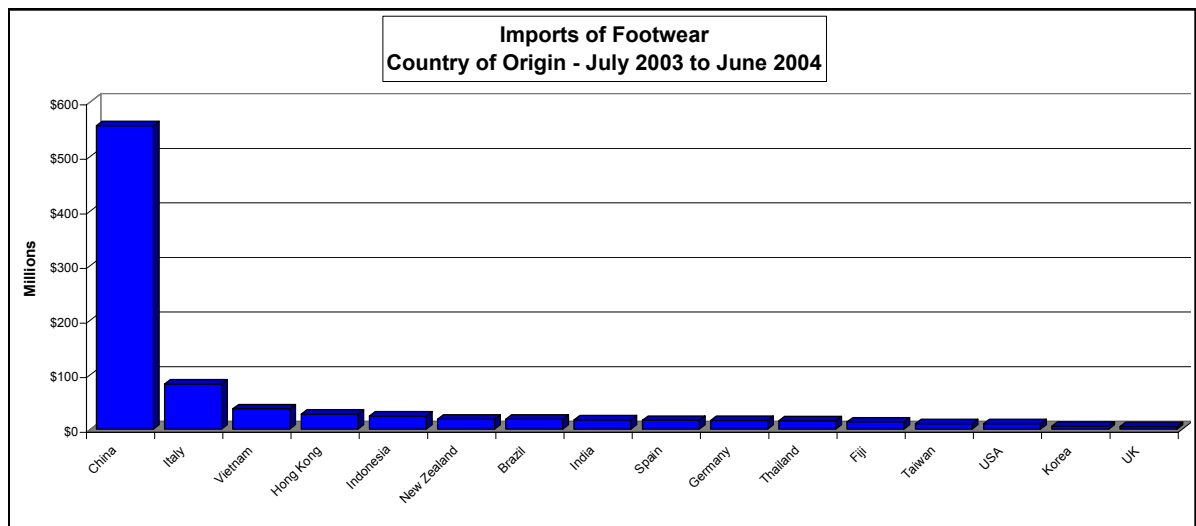
Imports by Major Countries of Origin



* Yarn, fabrics and made up articles

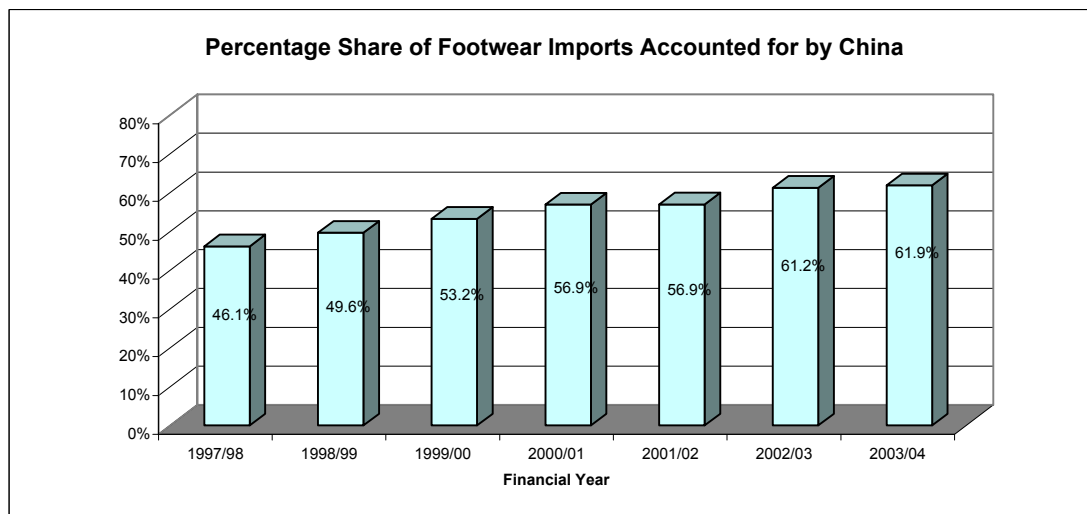
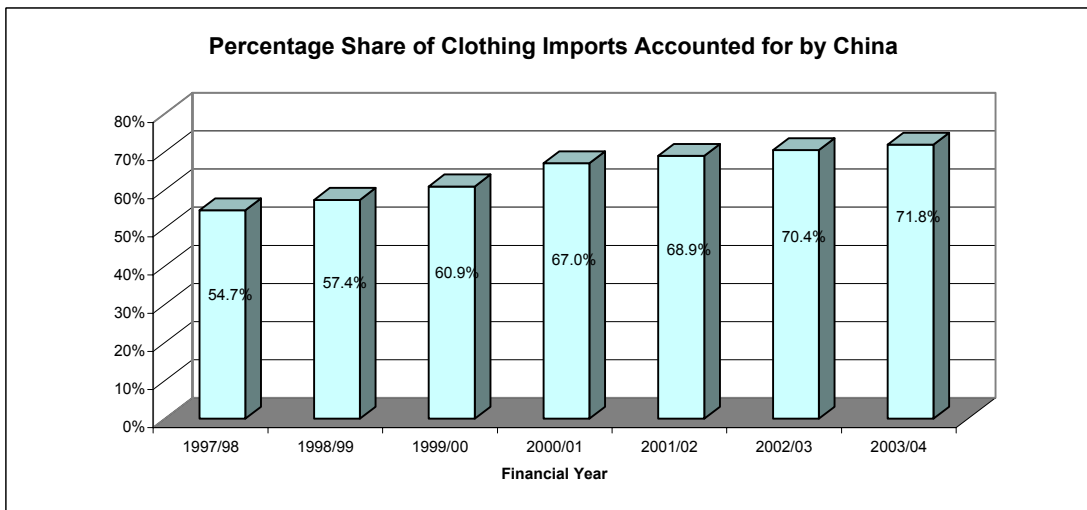
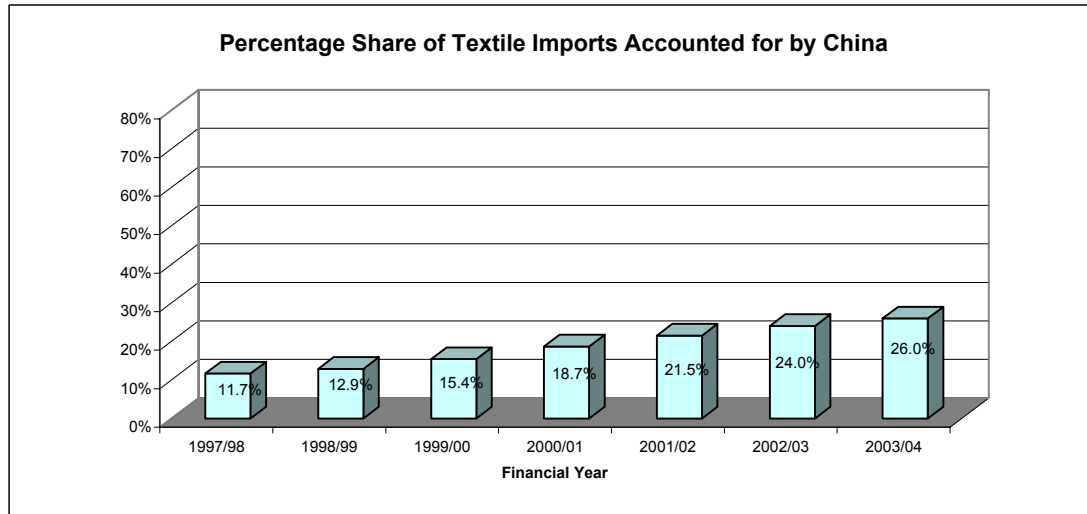


** Clothing and clothing accessories



Source ABS

China Share of TCF Imports at FOB Value 1997/98 TO 2003/04



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